

Teaming with your State CPA Society

Presentation to NESTOA

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Amy Pitter



Tax Administrators and CPAs are....

☐ Natural adversaries

☒ Natural allies

Let's discuss....



One way to look at it...

**DOR - The
highest **legal**
amount**

**The Common
Ground**

**CPA - The
lowest **legal**
amount**

What does a state CPA society do?

Society Strength

- Strengthen our organization by better understanding our members and providing highly relevant, valuable benefits and services

Professional Competency

- Produce educational offerings that are customized, relevant and enable our members to provide outstanding service to their clients

Public Policy

- Enhance our position as a key resource to lawmakers and the administration, and protect and promote the profession through lobbying efforts

Sustain the Brand

- Strengthen the profession through initiatives and branding designed to recruit and retain a talented and diverse workforce

MSCPA by the Numbers

Last
year,
the
MSCPA:

Connected with:



2,280 members on
LinkedIn;



929 likes
on Facebook; and



2,501 followers
on Twitter.



Coordinated **6** live tax
chats for Boston.com
readers.

12 issues of
sumnews



48



Held **179** CPE courses
in **16** locations
throughout
Massachusetts.

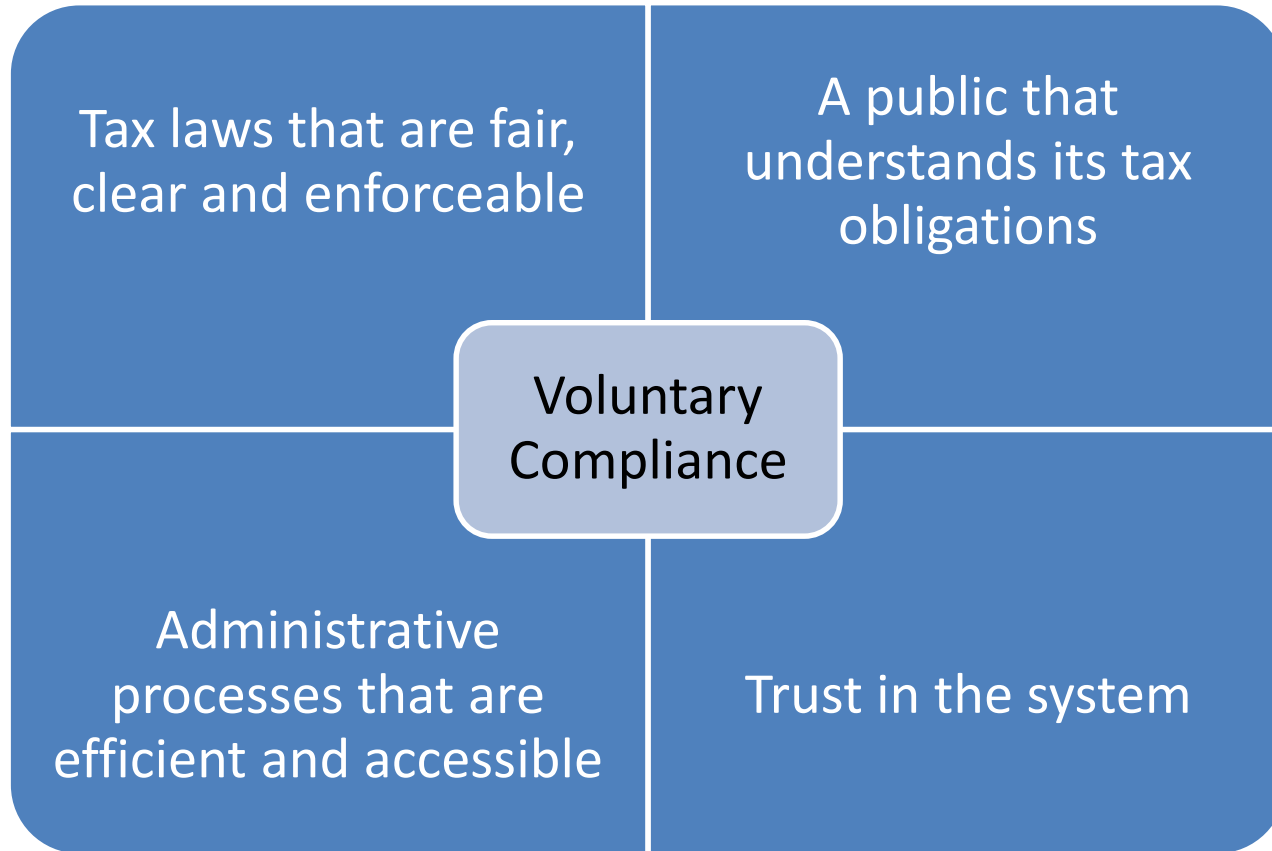
Offered **21**
committees for MSCPA
members to join, and
created a network of
670 active members.



Satisfied **201** requests
from local and
national media outlets.

learn ... connect ... prosper

Our interests are aligned



A public that understands its tax obligations

CPA Society

Increase CPA value to business community

Increase Society value to CPAs

Leverage professional competency ability of CPA Society

Leverage education and communication tools of the Society

Revenue Official

Like having thousands of educators out in the field

Great feedback on what is clear and what is unclear

Tax laws that are fair, clear and enforceable

CPA Society

Easier to explain to clients

Increased client satisfaction

Increase CPA ability to be profitable

Revenue Official

Improves compliance

Eases audit and dispute resolution burdens

Administrative processes that are efficient and accessible

CPA Society

Increase CPA value to clients

Increase Society value to CPAs

Increase CPA ability to be profitable

Revenue Official

Greater efficiency means lower cost

Great feedback on what users find “efficient”

Trust in the System

CPA Society

Aligns to interest in ethics and integrity in the profession

Sets the right tone with business community

Fosters greater collaboration with DOR

Revenue Official

Improves interactions with practitioners, financial professionals and the public

Fosters greater collaboration with state societies

Increases voluntary compliance

Example 1 – MSCPA/DOR

- MA DOR Advisory Council
- Education and outreach on new system
- Brainstorming on combined reporting simplification
- Partnership on industry guides
- Practical feedback on amnesty
- Taxpayer advocate meetings
- Articles in our magazines and newsletters
- Speak at our conferences and CPE events



Example 2 – Vermont





- Smart Collaboration – The Rhode Island Society of Certified Public Accounts (RISCPA) is proud and privileged to have a pro-active (open door policy) relationship with the RI Department of Revenue and the Division of Taxation.
- The Benefits are Mutual:
 - Serving as an arm of communication on policy and matters relating to operational procedures is an excellent way of keeping the Society's member population apprised in a timely manner. And, it's most helpful to DOR/Division of Taxation in getting pertinent information to the right audience.
 - The DOR/Division of Taxation presents at various times during the year at the Society's educational facility. Besides presentation of content and commentary, there is personal connectivity with members and DOR/Division of Taxation personnel.
 - Throughout the year, we often communicate to the DOR/Division of Taxation that it's important to look at RISCPA as a resource partner.
 - The DOR/Division of Taxation head, David Sullivan, is a standing member on RISCPA's Tax Committee.



13,407 Licensed CPA members (Sept 2015)

New Jersey CPA Magazine

The award-winning publication of the New Jersey Society of Certified Public Accountants (NJCPA) is a proven resource that reaches influential accounting and financial executives six times per year. More than 70% of *New Jersey CPA* readers are senior-level executives. Among the 24,000 readers; 51% are CPAs in public practice and 29.1% have a corporate role in business and industry.

NJCPA Pulse

The biweekly email newsletter is sent to more than 14,000 opt-in subscribers. The content of *NJCPA Pulse* is customized for each subscriber based on their experience, demographics and interest in more than 75 topic areas.

Connect

njcpa.org/connect is a members only intranet community where members share information with peers, learn new skills and network with fellow members.

njcpa.org

The website receives an average of 20,000 unique visitors and 140,000 page views per month.

Social Media

Facebook www.njcpa.org/facebook

LinkedIn www.njcpa.org/LinkedIn

YouTube www.njcpa.org/youtube

Twitter www.njcpa.org/twitter

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RALPH ALBERT THOMAS, CGMA
CEO and Executive Director
NJCPA
425 Eagle Rock Avenue
Suite 100
Roseland, NJ 07068
973-226-4494, ext. 232
rthomas@njcpa.org
[linkedin.com/in/ralphalbertthomas](https://www.linkedin.com/in/ralphalbertthomas)



DON MEYER
Chief Marketing Officer
NJCPA
425 Eagle Rock Avenue
Suite 100
Roseland, NJ 07068
973-226-4494, ext. 207
dmeyer@njcpa.org
[linkedin.com/in/donpmeyer](https://www.linkedin.com/in/donpmeyer)



JEFFREY T. KASZERMAN
Government Relations Director
NJCPA
425 Eagle Rock Ave., Suite 100
Roseland NJ 07068
973-226-4494, ext. 210
fax 973-226-7425
jkaszerman@njcpa.org

- PA CPA Journal – The quarterly Journal reaches all 22,100 PICPA members. The Department of Revenue is often the focus of the State & Local Tax and Legislative News columns.
<http://www.picpa.org/content/47469.aspx>
- Legislative Update – We publish and distribute an electronic newsletter that captures legislative and regulatory activities from the State Capitol.
<http://www.picpa.org/content/Resources/Publications/Legislative-Update.aspx>
- Annual Meeting with PA Department of Revenue – Annually the PICPA State Taxation Committee and the Department of Revenue convene for a “Questions & Answers” session where practitioner questions are submitted to the department which then provides a written response. The responses are put on our website. <http://www.picpa.org/Content/38708.aspx>
- Quarterly meetings with PA Department of Revenue – In addition to the annual “Q&A,” members of our State Taxation Committee hold quarterly meetings with the department to discuss systemic issues.
- State Taxation E-mail Discussion Group – We have an active state taxation discussion group where practitioners post questions on both state and federal tax matters. This is a very active group that generates a lot of discussion. The discussion group has about 2,000 participants



900 members
Can post to website or direct email to members

Dana L. Rubenstein, Esq.
President/CEO
Delaware Society of CPAs
3512 Silverside Road
8 The Commons
Wilmington, DE 19810
302.478.7442
302.478.7412 fax
dana@dscpa.org
www.DSCPA.org





- GWSCPA, which serves DC metro, has 3,300 members
- Kari Bedell, kbedell@gwscpa.org , 202-747-4059, 1140 Connecticut Ave, NW #606 Washington, DC 20036
- Opportunities
 - monthly e-newsletter
 - daily local news feed
 - regular Tax Section meetings
 - tax practitioners workgroup



- Quarterly Commissioner / CPA meeting.
 - It is not formal, it is not noticed, and there are no minutes.
 - So quarterly we talk about:
 - Areas of federal law changes that effect the state.
 - Areas of state law that does not translate well into the filing forms.
 - Reports on electronic filing and DOR processing issues.
 - Top 10 DOR issues of filing problems that we feed back to our members.
 - DOR budget issues and understanding department staff issues.
 - DOR update on staffing promotions and hires.
 - CPA review of new regulations and website issues.
 - New forms review.
 - Review and reports on collection methods and how to best represent taxpayers.
 - This is a very collaborative and positive process and we are there to build professional relationships and help each other out.

Make it work!



- Both parties need to see the value
 - Education and Outreach
 - Collaboration
 - Feedback/Insight
 - Support
- Understand the opportunities available through your state society
 - Create new opportunities
- There needs to be trust
 - Individual as well as organizational
- Work on concrete things
- Work in small groups
- Keep up a regular schedule

